

Identify today the opportunities for professional services in the 1990s...

U.S. Professional Services Market, 1989-1994

Current and Prospective Professional Services Vendors:

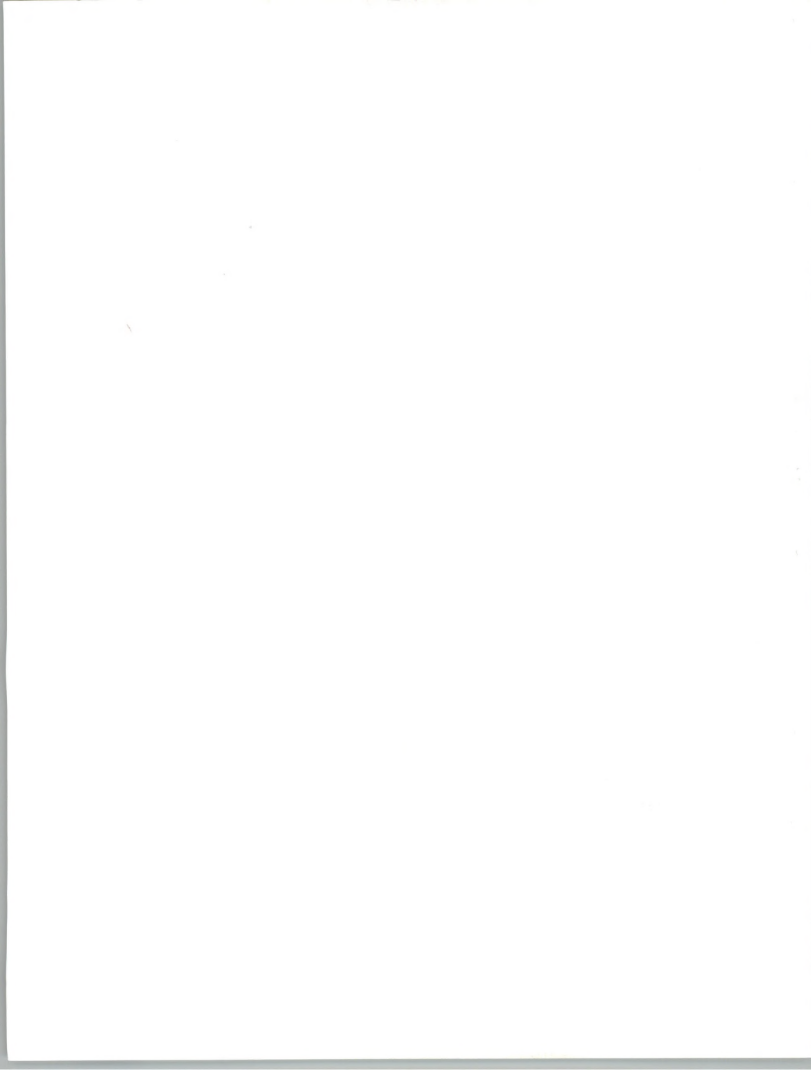
- FORECAST efficiently your potential market for the next five years
- INCREASE your market share by effectively updating your professional services strategy
- DEVELOP your successful professional services image based on your customers' requirements
- COMPETE successfully by assessing your competitors' professional services strategies
- IDENTIFY partners for professional services projects
- VALIDATE your strategic marketing and development strategies

IS Managers and Buyers of Professional Services:

- STAY AHEAD by evaluating how future professional services trends will benefit you

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Valuable Information for Professional

Challenges in professional services include:

- Identifying, attracting, and retaining technology experts
- Increasingly sophisticated buyers of services
- More mergers and acquisitions
- Changing information systems market structure

Both vendors and buyers need the right answers now to these urgent questions.

<i>U.S. Professional Services Market, 1989-1994</i>
Market Size and Forecasts
<ul style="list-style-type: none">• Structure of professional services market• Market size and growth rate, 1989-1994• Largest markets• Leading vendors• User expenditures by functional area• User expenditures by customer size• Market driving forces• Growth inhibitors• Market opportunities
Issues and Trends
<ul style="list-style-type: none">• Changing buyer focus• Competitive pressures• Increasingly complex solutions• Changing senior management view of IS• Shortages in certain skills• Consolidations and alliances• Full service suppliers• Changing information systems market structure• Internationalization
Competitive Environment
<ul style="list-style-type: none">• Company description and background• Key products and services• Industry markets• Geographic markets• Computer hardware and software

What's the major trend?

Buyers focusing on core business applications? More users becoming buyers of information services? New technology applications? Vendor focus on repeatable solutions? More competition? Validating, assessing, and evaluating current strategies against future trends will optimize your company's opportunities in the 1990s.

What vendor alliances and joint ventures have the greatest influence?

INPUT identified more than two dozen key alliances and joint ventures between professional services vendors. Which vendors have been most active in creating alliances? What are the reasons behind these flexible alliances? What is the role of IBM's investments in professional services and software products vendors?

What's the size of your potential market?

Vendors need accurate information before creating effective strategies. To help with the analysis, INPUT segmented the professional services market into four components:

- Software development
- Consulting
- Education and training
- Systems operations

INPUT determined the size of the professional services market through comprehensive user and vendor interviews and in-depth market intelligence. The report includes valuable user expenditure data by:

- Size of organization within vertical sectors
- Business functional area



Services Success in the 1990s

“INPUT's *Professional Services Market, 1989-1994* includes primary research and provides you with the information you need most to succeed in the 1990s.”

Which classes of vendors offer professional services?

More than just computer equipment manufacturers and traditional professional services vendors now offer professional services. Find out the major vendors of professional services in each of the following categories:

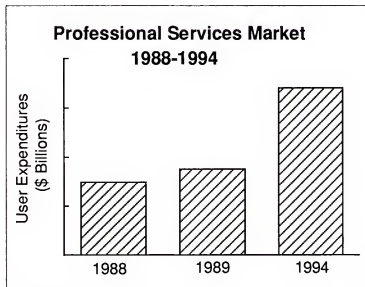
- Software products
- Public accounting
- Turnkey systems
- Manufacturing-based spinoffs
- Processing/network services
- Non-U.S. vendors
- Not-for-profit organizations
- Management consulting
- Temporary personnel agencies
- Telecommunications

We've Got the Answers!

INPUT's *U.S. Professional Services Market, 1989-1994*

Strategic Information You Need TODAY
for Professional Services Success
Tomorrow

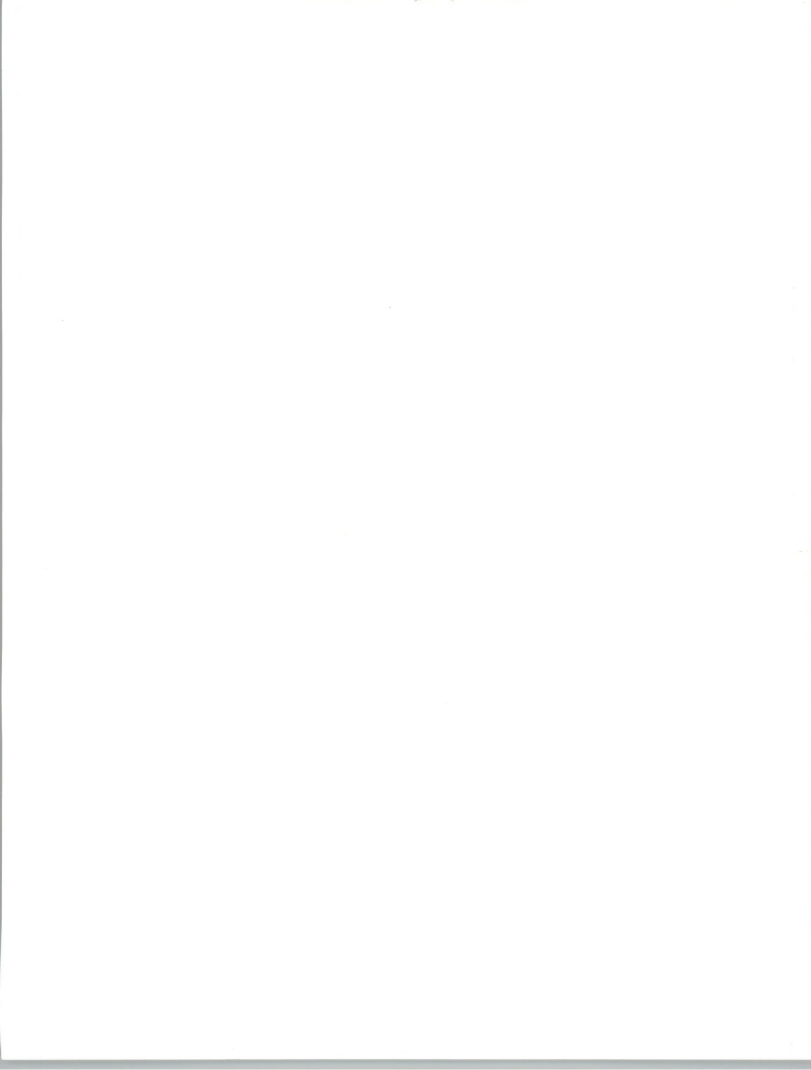
What's the major trend in professional services?



Base your strategy on knowing:

- Key professional services market segments
- The size and growth rate of each market segment
- Leading vendors

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INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

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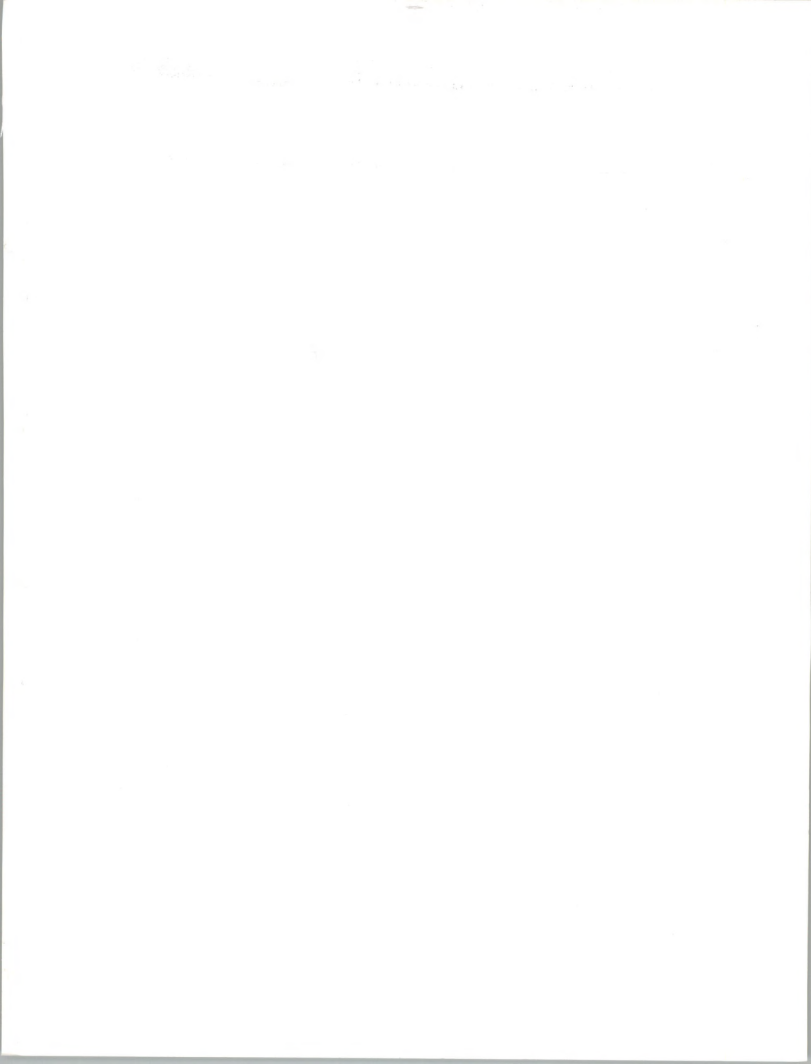
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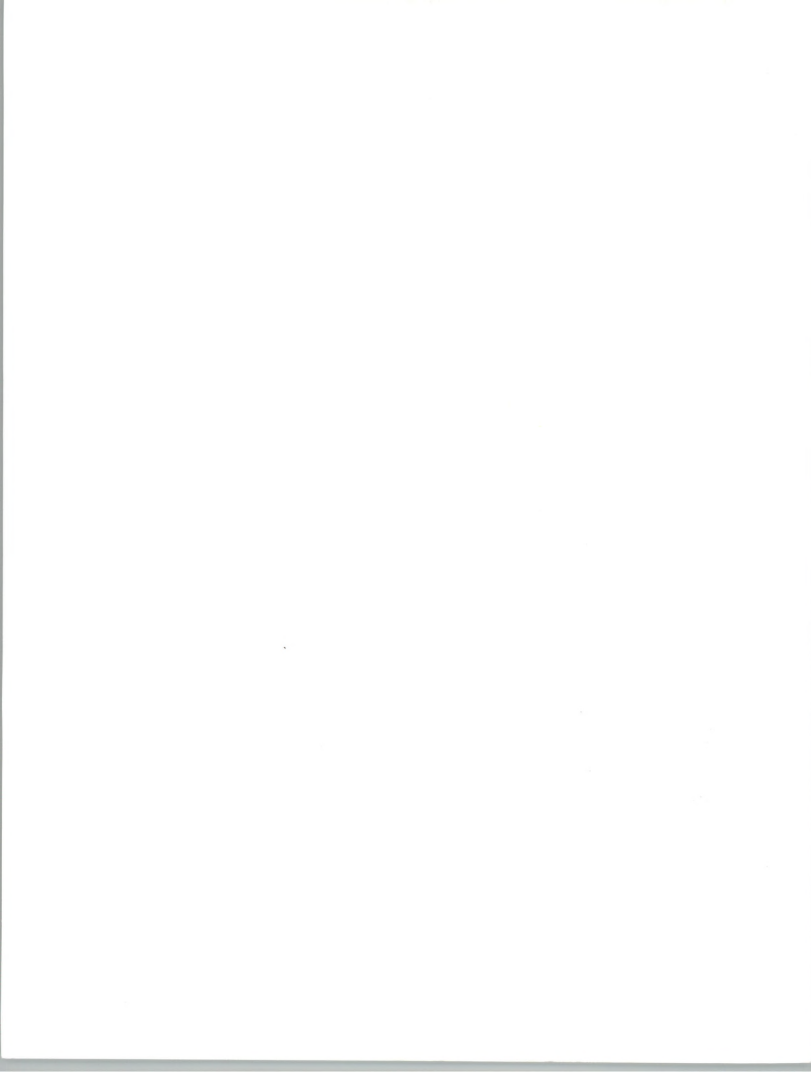
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The just-completed *U.S. Professional Services Market, 1989-1994* report focuses on:

- Reasons behind this growth
- Demand inhibitors
- Key trends and issues
- Leading vendors
- Opportunities for buyers and vendors

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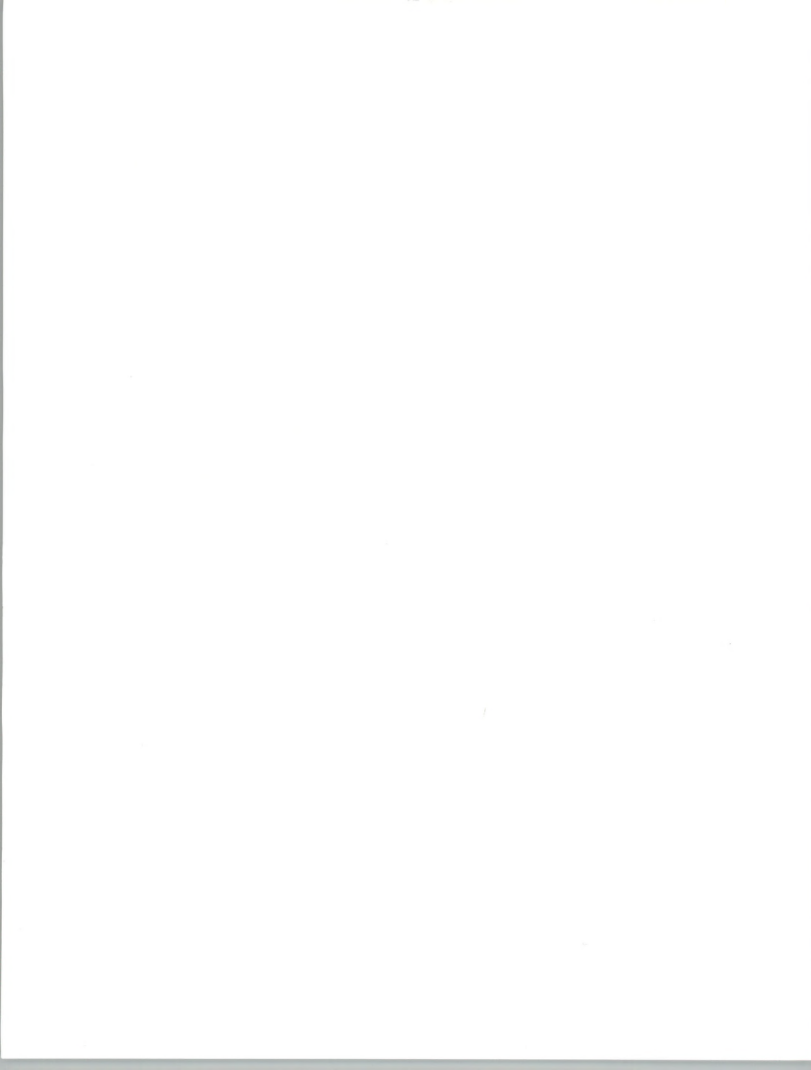
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U.S. Professional Services Market, 1989-1994

Current and Prospective Professional Services Vendors:

- o FORECAST efficiently your potential market for the next five years
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Two Page Header: Valuable Information for Professional Services Success in the
1990s

Quote: "INPUT's *Professional Services Market, 1989-1994*, includes primary research and provides you with the information you need most to succeed in the 1990s."

----- INSERT -----

U.S. Professional Services Market,
1989-1994

Market Size and Forecasts

- o Structure of Professional Services Market
- o Market Size and Growth Rate, 1989-1994
- o Largest Markets
- o Leading Vendors
- o User Expenditures by Functional Area
- o User Expenditures by Customer Size
- o Market Driving Forces
- o Growth Inhibitors
- o Market Opportunities

Issues and Trends

- o Changing Buyer Focus
- o Competitive Pressures
- o Increasingly Complex Solutions
- o Changing Senior Management View of IS
- o Shortages in Certain Skills
- o Consolidations and Alliances
- o Full Service Suppliers
- o Changing Information Systems Market Structure
- o Internationalization

Competitive Environment

- o Company description and background
- o Key products and services
- o Industry markets
- o Geographic markets
- o Computer hardware and software

----- END -----



WHAT'S THE MAJOR TREND IN PROFESSIONAL SERVICES?

Buyers focusing on core business applications? More users becoming buyers of information services? New technology applications? Vendor focus on repeatable solutions? More competition? Validating, assessing, and evaluating current strategies against future trends will optimize your company's opportunities in the 1990s.

WHAT VENDOR ALLIANCES AND JOINT VENTURES HAVE THE GREATEST INFLUENCE?

INPUT identified more than two dozen key alliances and joint ventures between professional services vendors. Which vendors have been most active in creating alliances? What are the reasons behind these flexible alliances? What is the role of IBM's investments in professional services and software products vendors?

WHAT'S THE SIZE OF YOUR POTENTIAL MARKET?

Vendors need accurate information before creating effective strategies. To help with the analysis, INPUT segmented the professional services market into four components:

- o Software development
- o Consulting
- o Education and training
- o Systems operations

INPUT determined the size of the professional services market through comprehensive user and vendor interviews and in-depth market intelligence. The report includes valuable user expenditure data by:

- o Size of organization within vertical sectors
- o Business functional area



WHICH CLASSES OF VENDORS OFFER PROFESSIONAL SERVICES?

More than the computer equipment manufacturers and traditional professional services vendors now offer professional services. Find out the major vendors in professional services from each of the following categories:

- o Software products
- o Public accounting
- o Turnkey systems
- o Manufacturing-based spinoffs
- o Processing/network services
- o Non-U.S. vendors
- o Not-for-profit organizations
- o Management consulting
- o Temporary personnel agencies
- o Telecommunications

Note: Please insert Exhibit II-2

Base your strategy on knowing:

- o Key professional services market segments
- o The size and growth rate of each market segment
- o Leading vendors

We've Got the Answers!

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Market, 1989-1994**

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INPUT identified two key issues—the lack of qualified personnel and new market competitors. The lack of qualified personnel to perform professional services stems from demographic trends and economic realities. The declining birth rate of the 1960s and 1970s has resulted in fewer entry-level programmer/analysts and consultants, and managers. In addition, professional services firms must identify and attract the right people, pay competitive wages and benefits, and maintain its professional staff through training classes.

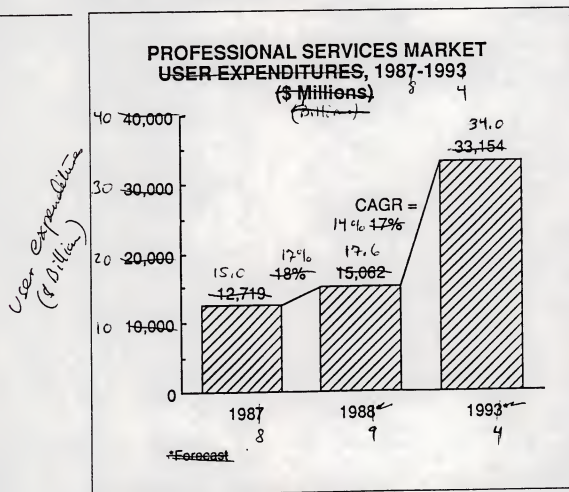
“Pure” professional services firms no longer have the professional services market to themselves. INPUT identified 14 categories of vendors, many of which are relatively new, offering professional services. Well-financed firms, such as computer hardware manufacturers, subsidiaries of aerospace/defense firms, and not-for-profit organizations, represent formidable competition to established professional services vendors.

B

Professional Services Market User Expenditures

In 1987, users spent \$12.7 billion in the U.S. for professional services. As indicated in Exhibit II-2, user expenditures are expected to grow 18% in 1988, reaching \$15.1 billion.

EXHIBIT II-2





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Note: For 5-1/2 inch X 8 inch INPUT paper:

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The just-completed *U.S. Professional Services Market, 1989-1994* report focuses on the:

- o Reasons behind this growth
- o Demand inhibitors
- o Key trends and issues
- o Leading vendors
- o Opportunities for buyers and vendors

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Sincerely,

~~Peter A. Cunningham~~
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Optimize software product strategy by targeting growth market opportunities

The U.S. software products market overall growth is projected to slow modestly over the next five years as the industry continues to show signs of maturing. However, INPUT projects that this market will continue to provide strong growth opportunities in many software market sectors.

INPUT projects that the systems software products market, in particular, will provide a number of high-growth product opportunities.

The just-completed *U.S. Software Products Market, 1989-1994*, focuses on the reasons behind the slowing growth rate, identifies the product and market areas expected to provide the highest growth rate potential, and discusses strategies for maximizing growth opportunities within these software product markets.

To receive your copy of this pivotal report, please mail or fax the enclosed order form, or call INPUT at (415) 961-3300.

Best regards,



Mary A. Raymond
Senior Consultant



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Optimize software product strategy through targeting growth market opportunities...

U.S. Software Products Market, 1989-1994

Current and Prospective Software Vendors:

- FORECAST your potential market for the next five years
- MAXIMIZE YOUR R&D by focusing on the higher growth product opportunities for the 1990s
- INCREASE YOUR MARKET SHARE by effectively restructuring your software product strategy
- COMPETE SUCCESSFULLY by assessing your competitor's software strategies
- IDENTIFY candidates for potential alliances and/or mergers and acquisitions
- STAY AHEAD by evaluating emerging technologies for incorporation into an integrated product strategy
- EVALUATE current software market issues for possible weaknesses in product positioning

CA, Sybase, Ingres,
McCormack & Dodge,
The Santa Cruz
Operation, and more...
are profiled in INPUT's
U.S. Software Market
report

Information That's CRUCIAL for Software

INPUT'S *U.S. Software Products Market, 1989-1994* forecast is based on a survey of over 500 of the larger vendors of software products and in-depth discussions with over fifty company executives on trends and issues impacting the software products industry. In addition, research results from INPUT reviews of fifteen industry-specific and seven cross-industry markets, based on interviews with leading vendors and end users, are incorporated into this annual study of the U.S. software products industry.

Both vendors and users can benefit from the analysis of the software products—market size and growth rates, market trends and issues, and the changing competitive environment—featured in this report.

The U.S. software products market is maturing, reflected in slowing annual growth rates. The adjustment to a slower growth environment is being complicated by the requirements for increasing product complexity, global market positioning, and accelerating rates of software product obsolescence.

The content of the report addresses the following questions related to the structural changes of the software products industry.

What are the largest application software products markets, and what markets represent the higher growth opportunities?

Much of the historical product development emphasis in the software products industry was on cross-industry (horizontal) solutions. Certain of these cross-industry markets now represent the larger, more mature software product sectors. However, there are still high growth market opportunities in several of the cross-industry sectors, which are identified in the report.

Industry-specific (vertical) software products markets are receiving considerable attention, particularly from the large computer systems vendors, as part of a total solutions marketing strategy. Many vertical markets represent smaller niche market segments. The larger, faster growing vertical markets, which can provide sustained longer term growth, are highlighted in the report.

Why will the systems software products market reflect a higher growth rate than the application software software markets in the 1990s?

The application development tool market is projected to represent major product opportunities in the 1990s for independent software vendors, computer systems vendors, and professional services companies. The ability to develop quality software in a cost competitive manner will be a major factor for success in the software products markets of the 1990s.

CASE, image processing, and voice recognition all represent technologies in early stages of development, with large market potential over the next ten years.

Why should many software products companies have formal alliance and mergers and acquisitions programs?

The software products industry is undergoing major structural changes which will continue well into the 1990s. These relate to the maturing of particular market segments, accelerated R&D cost stemming from the increased product complexity of an integrated product requirement, and the rapid rate of change in hardware technology which is accelerating the pace of software product obsolescence.

Also, the relative performance of the high technology sectors in recent years versus the broader market indexes reflects investors' perceptions of the maturing of this industry. The ability to raise capital for both new and mature software products companies through the traditional public markets has become much more difficult since the stock market "crash" of October 1987.

Increasingly, software company managers will be required to look to alternative methods for leveraging their technology, including marketing relationships and obtaining equity from nontraditional market sources.

In addition, the larger computer systems, professional services, and non-industry companies with strong financial and marketing capabilities are becoming much more aggressive in the software products markets. This is increasing the level of competition.

Success in the 1990s

The report outlines approaches for both independent software developers and computer systems vendors to maximize product opportunities within this changing environment.

U.S. Software Products Market, 1989-1994

Market Size and Forecasts

- | | |
|---|---|
| <ul style="list-style-type: none">• Overall market, 1989-1994• Applications software<ul style="list-style-type: none">- Overall market size and growth- Industry-specific applications market- Cross-industry applications market• Leading applications software products vendors | <ul style="list-style-type: none">• Systems software<ul style="list-style-type: none">- Market size and growth by principal sub-delivery modes- Leading systems software products vendors• Market forces• Market opportunities |
|---|---|

Issues and Trends

- | | |
|---|--|
| <ul style="list-style-type: none">• Software products technology/market trends<ul style="list-style-type: none">- Client/server implementation- Application development tool technology- Voice recognition- Image processing/document management- Multimedia applications- Mergers and acquisitions- Alliances- Standards- Project management software- Decision support systems/executive Information systems | <ul style="list-style-type: none">• Principal software industry issues<ul style="list-style-type: none">- Migration- Standards- Multi-platform support- Product obsolescence- Downsizing- User confusion- Return on investment (ROI) |
|---|--|

Competitive Environment

- | | |
|---|---|
| <ul style="list-style-type: none">• Software markets structural change• Competitive strategies | <ul style="list-style-type: none">• Software company profiles |
|---|---|

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Identify today the opportunities for professional services in the 1990s...

U.S. Professional Services Market, 1989-1994

Current and Prospective Professional Services Vendors:

- FORECAST efficiently your potential market for the next five years
- INCREASE your market share by effectively updating your professional services strategy
- DEVELOP your successful professional services image based on your customers' requirements
- COMPETE successfully by assessing your competitors' professional services strategies
- IDENTIFY partners for professional services projects
- VALIDATE your strategic marketing and development strategies

IS Managers and Buyers of Professional Services:

- STAY AHEAD by evaluating how future professional services trends will benefit you

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Valuable Information for Professional

Challenges in professional services include:

- Identifying, attracting, and retaining technology experts
- Increasingly sophisticated buyers of services
- More mergers and acquisitions
- Changing information systems market structure

Both vendors and buyers need the right answers now to these urgent questions.

What's the major trend?

Buyers focusing on core business applications? More users becoming buyers of information services? New technology applications? Vendor focus on repeatable solutions? More competition? Validating, assessing, and evaluating current strategies against future trends will optimize your company's opportunities in the 1990s.

What vendor alliances and joint ventures have the greatest influence?

INPUT identified more than two dozen key alliances and joint ventures between professional services vendors. Which vendors have been most active in creating alliances? What are the reasons behind these flexible alliances? What is the role of IBM's investments in professional services and software products vendors?

What's the size of your potential market?

Vendors need accurate information before creating effective strategies. To help with the analysis, INPUT segmented the professional services market into four components:

- Software development
- Consulting
- Education and training
- Systems operations

INPUT determined the size of the professional services market through comprehensive user and vendor interviews and in-depth market intelligence. The report includes valuable user expenditure data by:

- Size of organization within vertical sectors
- Business functional area

U.S. Professional Services Market, 1989-1994

Market Size and Forecasts

- Structure of professional services market
- Market size and growth rate, 1989-1994
- Largest markets
- Leading vendors
- User expenditures by functional area
- User expenditures by customer size
- Market driving forces
- Growth inhibitors
- Market opportunities

Issues and Trends

- Changing buyer focus
- Competitive pressures
- Increasingly complex solutions
- Changing senior management view of IS
- Shortages in certain skills
- Consolidations and alliances
- Full service suppliers
- Changing information systems market structure
- Internationalization

Competitive Environment

- Company description and background
- Key products and services
- Industry markets
- Geographic markets
- Computer hardware and software

Services Success in the 1990s

“INPUT's *Professional Services Market, 1989-1994* includes primary research and provides you with the information you need most to succeed in the 1990s.”

Which classes of vendors offer professional services?

More than just computer equipment manufacturers and traditional professional services vendors now offer professional services. Find out the major vendors of professional services in each of the following categories:

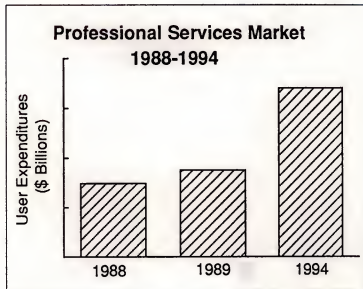
- Software products
- Public accounting
- Turnkey systems
- Manufacturing-based spinoffs
- Processing/network services
- Non-U.S. vendors
- Not-for-profit organizations
- Management consulting
- Temporary personnel agencies
- Telecommunications

We've Got the Answers!

INPUT's *U.S. Professional Services Market, 1989-1994*

Strategic Information You Need TODAY
for Professional Services Success
Tomorrow

What's the major trend in professional services?



Base your strategy on knowing:

- Key professional services market segments
- The size and growth rate of each market segment
- Leading vendors

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About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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